



# LIQUIDATION REQUEST

Use this form if you want to liquidate your asset(s) into cash. Your liquidation request will be initiated within 3-5 business days upon receipt of this form, unless you select "Expedited Service" in Section B.

Return by regular mail: 1688 Meridian Avenue, Suite 504, Miami Beach, FL 33139  
Fax: 605-415-4296 | E-mail: info@IRAFinancialTrust.com | For inquiries, call: 800-472-1043 or visit IRAFINANCIALTRUST.COM

## A. IRA OWNER IDENTIFICATION

FULL NAME \_\_\_\_\_ PHONE NO. \_\_\_\_\_ ACCOUNT NUMBER \_\_\_\_\_

## B. LIQUIDATION INSTRUCTIONS

EXPEDITED SERVICE: Check this box if you want this request to be expedited. Your request will be initiated within 1 business day upon receipt of this form in good order. **An expedited processing fee will apply (see FEE SCHEDULE & FINANCIAL DISCLOSURE).**

OVERNIGHT DELIVERY: Check this box if you want your liquidation request to be sent by overnight mail (via FedEx) to your asset sponsor. **Overnight delivery fee + shipping cost apply (see FEE SCHEDULE & FINANCIAL DISCLOSURE).**

Optional: Charge shipping cost to FedEx Account No.: \_\_\_\_\_  
If no account number provided, we will charge it to your IRA account.

List the asset(s) you wish to liquidate: (A liquidation fee will apply per asset liquidated; see FEE SCHEDULE & FINANCIAL DISCLOSURE)

Asset Name	Asset Sponsor Phone No. (required)	No. of Shares/Units		Dollar Amount
		\$	or	
		\$	or	
		\$	or	
		\$	or	
		\$	or	
		\$	or	

Need to add more assets to this list? Please attach a separate page and write "SEE ATTACHED" at the top of this form.

## C. DELIVERY INSTRUCTIONS How do you want cash to be sent to IRA Financial from your asset sponsor?

Send by check

Regular Mail

Overnight Mail Optional: Charge shipping cost to FedEx Account No.: \_\_\_\_\_

If no account number is provided, your asset sponsor may charge for the cost of shipping; contact your asset sponsor for more details.

Send by wire IRA Financial charges a \$15 incoming wire fee. Please note that your asset sponsor may charge an outgoing wire fee; contact your asset sponsor for more details.

## D. FURTHER INSTRUCTIONS Please select all that apply. Default is the first option if nothing is selected.

Once my assets have been liquidated into cash:

I would like the cash to be held in my Custodial Cash Account until further notice

I would like the cash to be distributed, I have attached a **DISTRIBUTION REQUEST** form

I would like the cash to be used for an investment purchase, I have attached an **INVESTMENT AUTHORIZATION** form

I would like the cash to be used to pay an expense, I have attached an **EXPENSE PAYMENT REQUEST** form

Other (please specify): \_\_\_\_\_

## D. AUTHORIZATION

I authorize IRA Financial Trust Company to liquidate the assets indicated above into cash. I understand that the cash will be deposited into my Custodial Cash Account until further instruction from me.

\_\_\_\_\_  
IRA Owner Signature Date / /